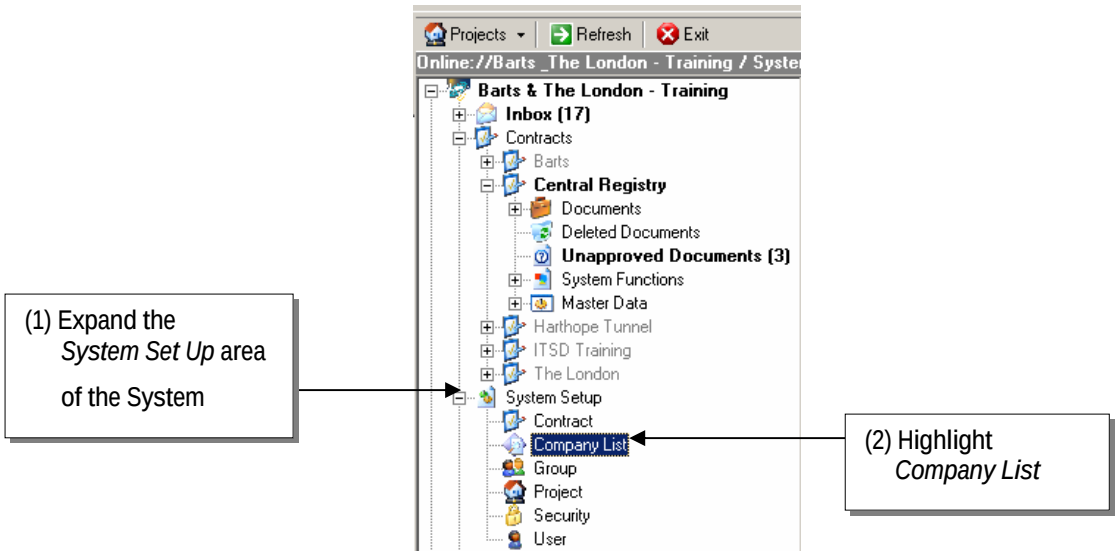
User Guide:
Creating New Companies

Rev. 06 – JAN. 2008

Adding New Companies to the Database

a. In the System Navigation area of the screen, click on the **+** beside ***System Setup*** and select ***Company List*** from the expanded list.

b. Click on the ***Create New Item*** icon found at the top left-hand corner of the upper screen.



c. In the bottom screen, type in the company details.

Note 1: 'Company Initials' *and* ***'Company Name'*** *are mandatory fields that must be completed.*

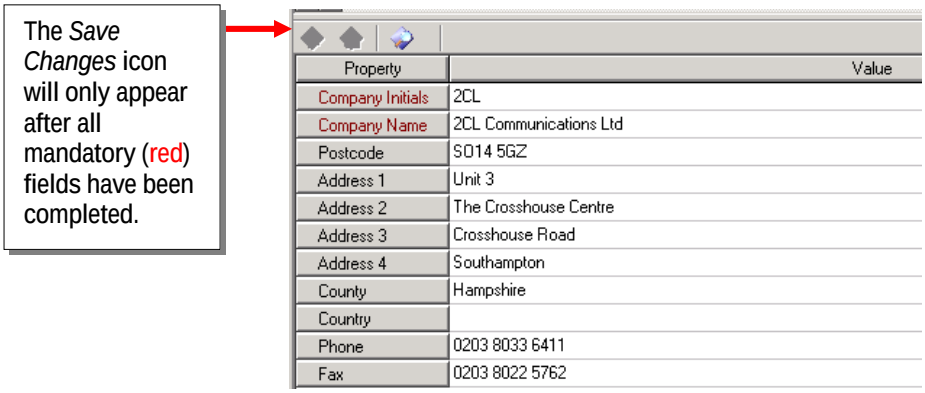
Note 2: *When typing in company initials, try to use initials that are relevant to the company.*

Note 3: *If the company postcode matches an existing postcode in the company list, an alert message will appear ('Possible Duplicate Company'), asking the user to confirm or change the new company's details.*

d. The remaining address fields below the *'Postcode'* field are optional data entry fields, **however,** *if these fields are left blank, the company address will be incomplete on any Transmittal Note generated for that company*.

e. Click on the ***Save Changes*** icon to save the new entry.

The Company List Data-Entry Screen

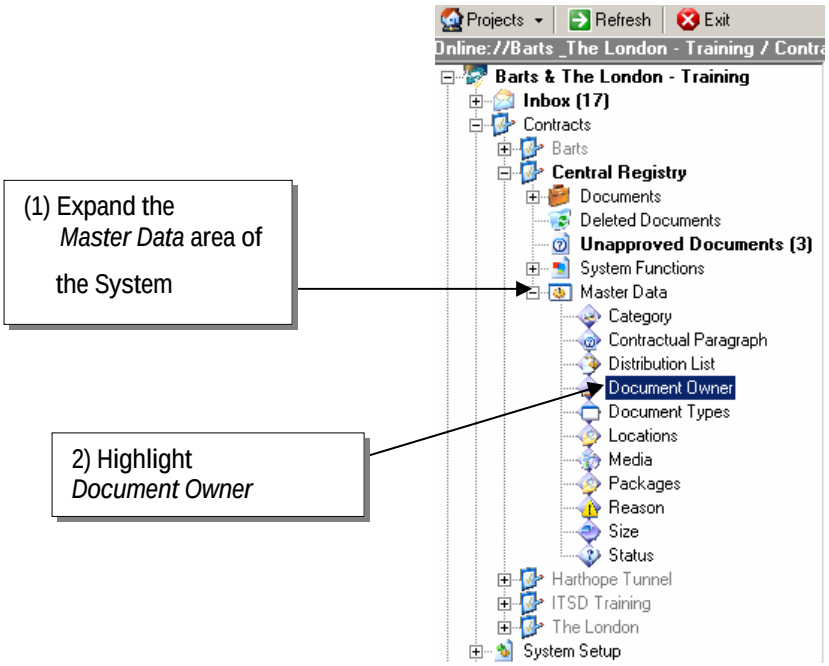


f. Repeat steps **b-e** to add additional companies to the database.

Note: *Although the new company (or companies) has been added to the database, its name will not appear (if conducting a search) in the 'Document Owner' drop-down list until the company's details have been added to the* ***Document Owner*** *area of the system.*

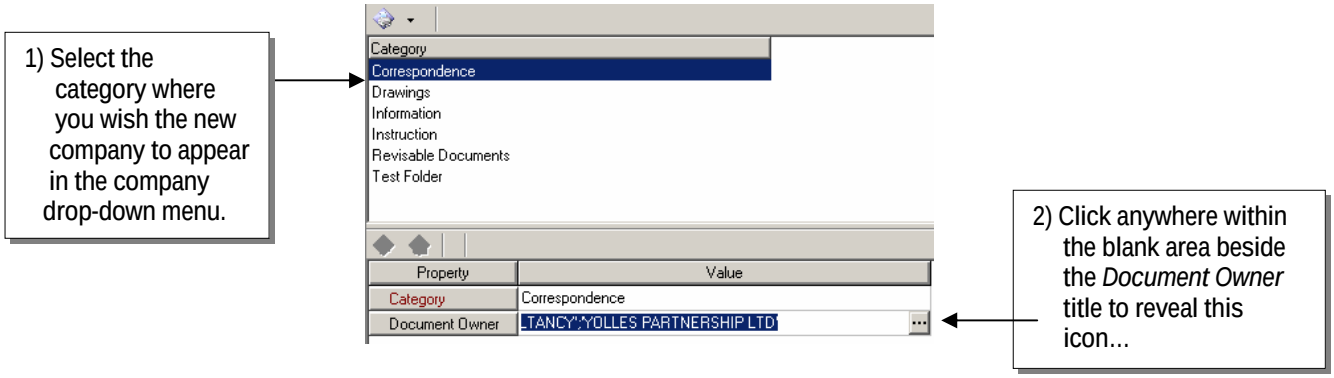
To allocate a company to the Document Owner list:

g. In the Navigation area of the screen, click on the **+** beside ***Master Data*** and select ***Document Owner*** from the expanded list.



h. In the upper screen, select the category where you wish the new company's name to appear in the *'Document Owner'* drop-down menu.

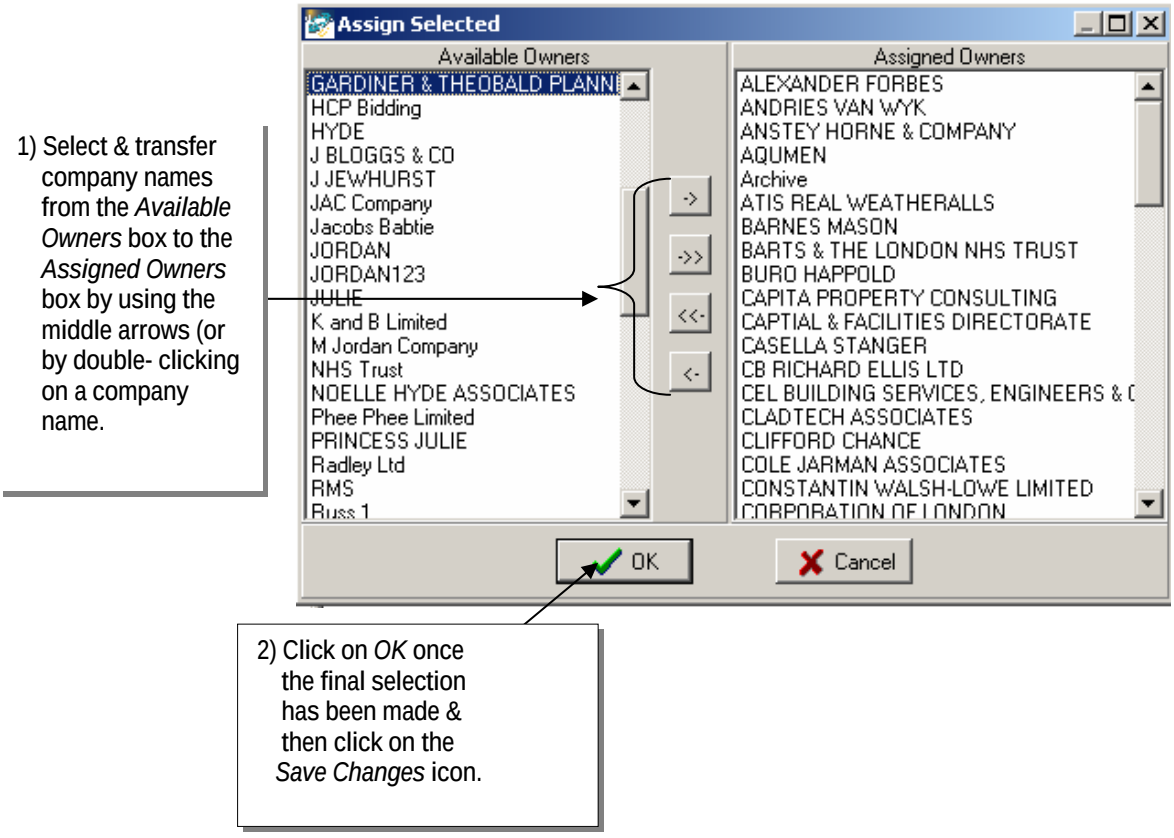
i. In the lower screen, click anywhere in the blank field beside ***Document Owner*** to reveal the **...** icon. Click on this icon to reveal the ***Assign Selected*** box.



j. In the left-hand ***(Available Owners)*** area of the box, search and highlight the name of the new company.

k. Either by double-clicking or using the available arrows, transfer the company name over to the right-hand **(*Assigned Owners***) area of the box. Multiple selections can be made by holding down the *'Ctrl'* key on the keyboard and highlighting selected names before clicking on the arrows.

l. Click on the ***OK*** box to confirm the selection before clicking on the ***Save Changes*** icon to save the new entry.



m. Re-select the project from the project drop-down list to ensure that the database has been updated with the new details.

Searching for Companies in the Company List Area

A user can search for specific company details logged in the database.

To search for a company:

a. In the System Navigation area of the screen, click on the **+** beside ***System Setup*** and select ***Company List*** from the expanded list.

b. Click on the ***Find*** icon and in the ***Find Company*** window, type in the company name (or part of the company name) in the ***Containing Text*** field. Click on ***OK***.

c. The system will list all results (if any) relating to the information entered in the search field.